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THE TROUSER MARKET IN INDIA

- > EXPERT TALK
- > TRENDS
- > TOMMY HILFIGER
- > KAPSONS

SPORTSWEAR INTERNATIONAL
 SEPTEMBER 2014

EAST OF EDEN
 The Tough side of summer denim

BEST IN MERCHANDISE AND TRENDS FROM ACROSS THE WORLD

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Dear Readers,

I and a lot of other men are gifted a lot of shirts. Every rakhi, every birthday, and every-you-name-it occasion--I get shirts. And we accept them with glee knowing fully well that a few centimeters or a few colours variations, here or there, won't matter.

Trousers are a totally different issue. I just have to pick them up myself. They are important and personal. I need to fit in them, feel comfortable and I very much need to feel good in them. By this basic logic I dare say that trousers should play a bigger role in creating brand loyalty than shirts.

Trousers are definitely here to stay in the Indian fashion scene. But before I begin to sound like I am an easy catch for a very scientific, great fabric, fit and consistency-perfecting brand, please be warned.

While ten years ago you would have caught me in single and double pleats, flat fronts, with an occasional turn-up bottom and a cord, today I am very complex. I am spoilt for choices from a plethora of fits, cuts, styles, fabrics, colours, value-adds, and of course brand names trying to get me. I am also variable in my range of moods, aspirations, inspirations, and occasions.

So, trousers are a truly defining and evolved category in fashion now. In this issue of Images Business of Fashion we look at the amazing evolution of trousers as a fashion group in India. Our research associates size the Trouser Market in India and define its categories and pinpoint key opportunities. In this issue, the Images Business of Fashion team also talks to some brand leaders and designers to take an in-depth look at not just the categories, prospects, innovations, collections, prevailing and forecasted trouser designs, cuts, fits, and fabrics. These are presented as lead stories in both the national sections of Images BoF. I would like to personally thank the industry leaders for sparing time to respond to our queries and for sharing such great insights. Hope you enjoy reading the issue.

September is that time of the year when the India Retail Forum unfolds, and those attending should go back with some great insights, new business and new friends this year too.

Hope to see you at the IRF.

Amitabh Taneja

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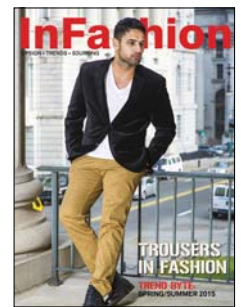
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GROWING FASHIONABLY

INCEPTED IN 1989, KAPSONS GROUP TODAY HAS BECOME A FORMIDABLE PRESENCE IN FASHION DISTRIBUTION AND RETAIL ARENA IN NORTH INDIA. IT IS NOW ALL SET TO GROW ITS LEGACY TO THE NATIONAL LEVEL. BY NAMITA BHAGAT


Co-founded by brothers Vipin and Darpan Kapoor, Chandigarh-based Kapsons Group is credited for introducing nearly 200 national and global lifestyle brands to North India, thereby transforming its fashion retail landscape. Its rise from a single fashion store to a prominent fashion distribution house and retail chain is quite exemplary. Vipin Kapoor, Chairman, Kapsons Group, states, "2014 has been a landmark year for us as we have completed 25 years in fashion retailing. Kapsons today has become a brand in its own right in northern India and we aim to sustain our pioneer position in the region. Moreover, we now aspire to create a nationwide retail presence." Adds, Darpan Kapoor, Vice Chairman, Kapsons Group, "We are ever more focusing on setting up new benchmarks in merchandise, service standards, store interiors and visual merchandising at all of our stores."

MARKET PRESENCE

Covering a total retail space of 4,10,859 sq.ft., Kapsons as of now operates 190 stores (company-owned and franchisee-owned) in 38 cities. Of the overall count, 42 are MBOs, 148 are exclusive stores of specific brands. "Beginning with Kapsons family store under MBO format, the company has as well launched other MBO formats that cater to distinct needs and audiences. So while Kapkids is for babies, kids and young teens, Kapsons Exclusive stocks the best of brands for women; and Krome is targeted at youth," explicates Vipin Kapoor. Presently, Kapsons' retail network extends over their home city Chandigarh, Punjab, Haryana, Himachal Pradesh and Jammu and Kashmir. In FY 2013-14, the brand registered a retail turnover of ₹439.66 crore. Gradually, it is making inroads into other parts of the country as well.

THE TROUSER MARKET IN INDIA

THERE ARE ABOUT 60 REGIONAL AND NATIONAL TROUSER BRANDS VYING FOR THE NUMBER ONE SPACE IN THE MARKET. THE TROUSER MARKET IN INDIA IS GROWING ANNUALLY AT AROUND 30–35 PERCENT; IT IS EXPECTED TO GROW AT A CAGR OF 8 PERCENT, FROM RS. 23,290 CRORE IN 2013 TO RS. 50,730 CRORE IN 2023. **AMIT GUGNANI**, SR. VICE PRESIDENT, FASHION – TEXTILE & APPAREL AND **KANTI PRAKASH BRAHMA**, PRINCIPAL CONSULTANT, FASHION AT TECHNOPAK SHED MORE LIGHT ON THE GROWTH DRIVERS, THE CHALLENGES AND OPPORTUNITIES THIS MARKET THROWS.

 The trouser market has evolved significantly over the past few years due to the change in consumers' dressing preferences, both in India and across the world. This market has registered outstanding growth largely due to growth in income levels, changes in lifestyle, and the entry of foreign brands, which has led to many options for the consumer to choose from. The trouser market is also among the fastest growing segments and has registered more rapid growth in the clothing business since the advent of polyester or viscose blends.

MARKET SIZE

India's domestic apparel market is expected to grow at a compound annual growth rate (CAGR) of 9 percent. This growth will be driven by an increase in both the per capita consumption of and the average spends on apparel. Currently, menswear is the biggest segment within the apparel market and is estimated to increase at a CAGR of 9 percent to reach US\$ 39.6 billion by 2023. Shirts, trousers, denim, etc. largely dominate this segment but there are also categories like winterwear, innerwear, T-shirts, suits, etc. Of these sub-segments, the trouser market is growing at a stupendous pace. The branded trouser market is growing annually at around 30–35 percent and there are about 60 regional and national brands competing. This market is expected to grow at a CAGR of 8 percent, from Rs. 23,290 crore in 2013 to Rs. 50,730 crore in 2023. Of this, the men's trouser market is expected to increase from Rs. 22,230 crore to Rs. 47,990 crore at a CAGR of 8 percent, while the women's trouser market is expected to rise to Rs. 2,740 from Rs. 1,060 crore, at a CAGR of 10 percent.

GROWTH DRIVERS

Until recently, the trouser market was dominated by local tailors; given the diversity in height and girth, Indian men opted for custom-stitched trousers primarily for their fit and, needless to say, their price and wearability. Now, however, there has been a marked shift in trends as younger consumers seek alternatives for trials and dull, tailored looks. Organised players have an important role in converting consumers from preferring tailor-made to readymade trousers by giving a plethora of options in terms of fits and colours. As a result, basic colours like black, brown and grey are replaced by vibrant ones making the look appear young and trendy.

Also, technology has made it possible for players to offer a variety of feels and appearances. Blended fabrics, for instance, lend the comfort of cotton while retaining their uber cool appearance. Again, with there being wider price diversity, with men's trousers available at low, economy, medium, premium and super-premium price-points, the segment offers options for all customers.





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2014-15

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OSCAR DE LA RENTA



ARCHANA KOCHHAR



ASHISH SONI



VIVIANNE WESWESTWOOD



ANEETH ARORA



BURBERRY S/S 14



MARC JACOBS

CHECKMATE

ARGYLE, PLAID AND GINGHAM MAKE A STUNNING DEBUT AS HORIZONTAL STRIPES MAKE A PLAY FOR FASHION AFICIONADOS

It is a game of checks and balances on the catwalk as style gurus are experimenting with un-trammelled and somewhat whimsical charms of geometry with lines clicking on all the right fashion boxes.

Maybe that is why London and Paris Fashion Weeks have been swept away with this euphonious trend, which is slowly making its way into the Indian customer's acceptable wardrobe. 3.1 Philip Lim SS 2014 line had men's shorts with drawstrings in monochromatic Gingham checks following the easy-breezy philosophy, but it was the true genius Marc Jacobs, who played around with the bold and beautiful sequined horizontal lines on his interesting rendition of curvy body hugging, floor sweeping gowns.

Lines and checks have a story to tell and most designers have realised the fact that they can either slim you down or bulk you up. Neil Barrett's spring-summer 2014 showcased black and white check shirts teamed up with shorts for men who simply like to it the classy way.

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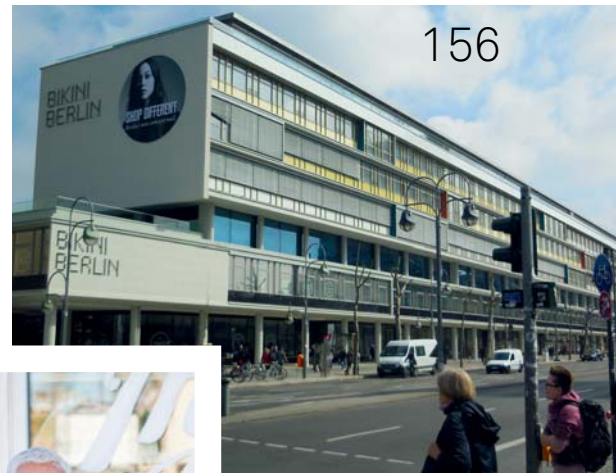
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Credits for India Capsule

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BLUE IS THE WARMEST COLOR DEGREE BY DEGREE, CITIZENS OF HUMANITY CONTINUES TO SUBTLY AND CAREFULLY UP ITS ALREADY ESTABLISHED SUCCESS.

BY CHRISTOPHER BLOMQUIST



A LOOK FROM CITIZENS OF HUMANITY'S PREMIUM VINTAGE WOMEN'S COLLECTION

➤ Things are heating up at Citizens of Humanity. The Los Angeles-based premium denim brand, which was launched by jeans expert Jerome Dahan in 2003, is enjoying positive reactions to the first collections created by Catherine Ryu and Simon Miller, who came aboard as women's creative director and men's creative director, respectively, in August 2013. The former has created a successful higher-end women's Premium Vintage capsule collection while the latter seems to have hit the bulls-eye with his total rebranding of the men's division, which includes an official name change to C-of-H Man.

"We rebranded the product and the logo and we created C-of-H Man as a division of Citizens of Humanity," Miller explains. "We updated all the branding and made it a lot more modern and relevant to today's consumer and then we slimmed down the fit. Previously it was very California and very relaxed and the styles were very stretchy light washes and that sort of thing. Now we have introduced raw denim and cleaner looks. While we've still maintained pieces and garments that have worked over time, we edited and

modernized them." "There were a handful of accounts that we pre-launched with [in April]—Barneys was one of them—and the slimmer fits right out of the gate have been very strong for us," adds Citizens of Humanity president Amy Williams. "As well, we also have stores and distribution in Japan and the reaction in the Japanese market both editorially and in sales has been very positive." The privately owned brand, which Williams says does in excess of \$100 million in sales each year, has always had a bigger women's business than men's. Despite the tweaking of the men's division, neither Williams nor Miller expect to see men's sales catch up with women's anytime soon, especially since steps are also being taken to improve the already successful women's collection. These include the spring 2014 launch of the new Premium Vintage women's capsule collection, which is based on Ryu's own personal denim archive. "It is outperforming our expectations," says Williams. "I think people really appreciate beautifully made highly crafted product and they understand and appreciate the value even though the price points are

higher, like \$268 and up." Product improvements aside, Williams and her team are also busy in other areas of the business, including promoting the brand via a printed brand magazine. Now on its fifth edition, the publication is also available digitally now. The company is also creating separate women's and men's "zines" that are lookbook/magazine hybrids. "Overall we really believe in storytelling and bringing the brand to life in terms of what's relevant in art and culture and music and that kind of thing so our emphasis is still working with, partnering with and telling the stories of those people who inspire us in those fields," Williams says. Asked to guess where the brand will be in three years, she laughs and says that she cannot predict. But she is optimistic: "I think that if we keep doing the good work that we have been doing even over the last year and this team stays together, which is all of our hope and aspiration, we will frankly surprise people by being a brand that is 14 years old at that point that is still quite relevant. As Jerome always likes to say, 'I'd rather be warm forever than hot for a second.'"



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